

## **Commercial Real Estate Back Office Management System**

### BACKGROUND

The client is a commercial real estate company serving the property transaction and asset management needs of the local market. As a premier commercial agency, the organization completes over 200 sale and lease transactions annually. Many of these deals contain multiple levels of representation and ownership, creating an interesting payment and billing dilemma. Additionally, the client serves an attractive and growing geography, resulting in a number of buyer/tenant representation arrangements that also generate revenue.

### CHALLENGE

As the organization grows, the ability to track, maintain and manage activity related to customers, property owners, listings and agents has become large and complex. The manual logs, processes, word documents and worksheets are cumbersome and difficult to maintain. Furthermore, trending, property comparisons, lease management and commission tracking for agent payment is time consuming and error-prone. A small Access database was developed to relieve some of the manual processes, however due to the volume of activity and company growth, has become unstable and unreliable.

### SOLUTION

Spitfire met with the executive sponsors to gain an understanding of the current systems and business processes to gain an understanding of their challenge. Once the requirements were documented, the Solutions Team worked to identify the alternatives available to help the client accurately collect, and manage property activity. The options included repairing the current Access database in its current state, repairing the database and adding some new functionality, constructing a new Commercial Property Tracking System that will meet the current business needs and allow for future integration with other back office systems and purchasing a commercially available software product and customizing it, if necessary, to meet the current business needs. Spitfire presented these alternatives to the project sponsors, and recommended that, although software products exist that manage real property; they are designed for large property managers and contain functionality that would not be useful by the agents in their portfolio.

CONTINUE...



**RESULTS**

The decision was made to construct a custom application that specifically met the needs of the client and its brokers. The application made use of menu driven user interfaces and user-defined selection boxes for added flexibility. Role-based security was built into the system so that client privacy and privileged information would be protected. A comprehensive set of reports, customized marketing brochures and flyers became a critical function of the application and allowed each broker to manage his activity without reliance on administrative support. Additionally, each client, property, and listing need only be entered a single time, and all relevant activity joined in relationship within the database.

**SUMMARY**

- **Increased Data Accuracy**
- **Improved Productivity**
- **Elevated Customer Service**
- **Scaled for Future Growth**

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